

# Future Proofing the Active Recreation Sector

## A Planning Framework

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angus  
& ASSOCIATES



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## Introduction

This document presents a Planning Framework for groups and organisations involved in delivering, or supporting the delivery of, active recreation experiences. This Framework is the result of a multi-stage project - coordinated by Sport NZ on behalf of 14 government agencies with an interest in active recreation and its outcomes – to which representatives of more than 200 sport and recreation organisations have contributed. The project was designed to achieve a sustainable active recreation sector aligned around the changing needs and expectations of participants and the Framework has been developed with this objective in mind.

## Active Recreation

‘Active recreation’ is a term used by Sport NZ and other groups and organisations across the sector. However, it is not a term that is widely used or well-understood by participants or the general public. Research undertaken for this project indicates that it is more meaningful to think of activities on a spectrum of structured to more flexible activities than to apply a rigid distinction between ‘active recreation’ and ‘sport’. ‘Active recreation’ can be considered a sub-set of typically flexible activities (activities participants can do when, with whom, how and where they want) within a more broadly defined set of ‘physical activities undertaken for the purpose of sport, exercise and recreation’. This aligns with the definition of ‘sport and active recreation’ used in Sport NZ’s new participation measure.

## Participation

Sport NZ’s **Active New Zealand Survey**<sup>(1)</sup> shows that the most popular activities undertaken by New Zealanders in 2013/14 were ‘recreational’ in nature: walking, swimming, cycling, equipment-based exercise, fishing, jogging/running and Pilates/yoga. The great majority of survey participants took part in these and other activities on a casual basis, on their own or with others, with just one in five taking part in activities through regular club competitions. Sport NZ’s **Young People’s Survey**<sup>(2)</sup> indicates that the majority of children aged 5-10 years also spend more than three hours a week participating in sport and recreation in the form of casual games and activities (described as “mucking around”).

As context for this project then, the Active New Zealand Survey and the Young People’s Survey highlight just how significant ‘active recreation’ is as a component of Community Sport. They also highlight the extent to which activity is undertaken independently of groups and organisations involved in the active recreation sector (albeit using the places and spaces provided by public and private sector groups and – on occasion – services provided by ACC, Water Safety NZ, NZSAR and other support agencies).

Within the sector, there is a widely-held view that participation in active recreation is growing, fuelled by a growing population, the stimulatory effects of a competitive marketplace, and by societal change (a growing older population, growing cultural diversity and time pressures that demand greater flexibility of participation). At the same time, growing ‘screen time’, an erosion in the traditional New Zealand outdoor recreation ethos, pressures on disposable income and the increasing prominence of new immigrant communities (for whom active recreation may not be a priority) are all thought to be placing downward pressure on participation – at least within some population groups.

A recently released report on national trends<sup>(1)</sup> highlights declining levels of adult participation in sport and active recreation over a 16 year period. This trend is most pronounced amongst young adults (aged 18-24 years), and amongst people identifying as Māori, Pacific and 'other' ethnicities, although participation amongst Pacific peoples has actually increased if walking is excluded. Adults living in lower income households also experienced greater rates of decline than the overall national trend.

Sport NZ's Active New Zealand Survey<sup>(2)</sup> also shows that participation in sport and active recreation is lower than average amongst women, older adults, Māori, Asian peoples, people living in less affluent communities and people living outside of the major urban centres. These findings are largely reflected in the perspective shared by providers participating in the current project, with some clear gaps apparent in the demographic profile of the groups these providers serve: notably, young people (<5 years of age), older people (65 years+), Māori, Pacific peoples, Chinese, Indian and other ethnic groups, people on lower incomes and people in rural communities.

### A Case for Change

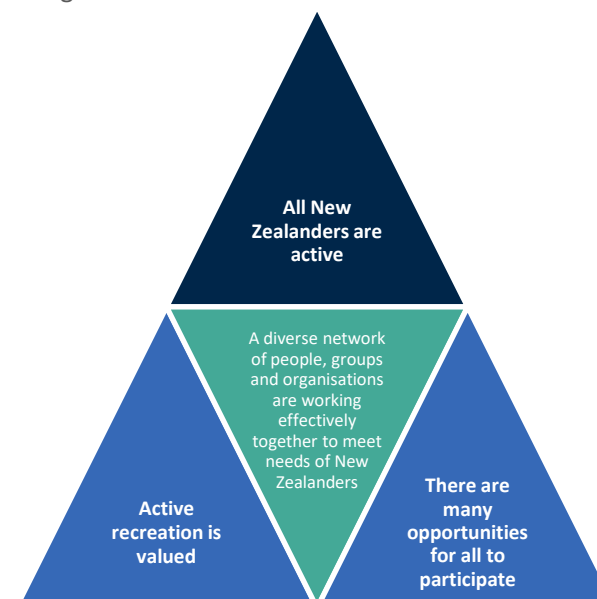
It is in the growing diversity of New Zealand's population (and especially growth in the groups where participation is already lower than average) and in what providers agree are the changing needs of participants, that a case for change in the active recreation sector can be found. At the same time, present supply-side issues – including 'unhealthy' competition between providers (fuelled often by funding pressures), poor governance, duplication of effort and failure to adequately address social, cultural and economic barriers to participation in active recreation – also suggest that change is needed.

## The Planning Framework

### Vision for Active Recreation

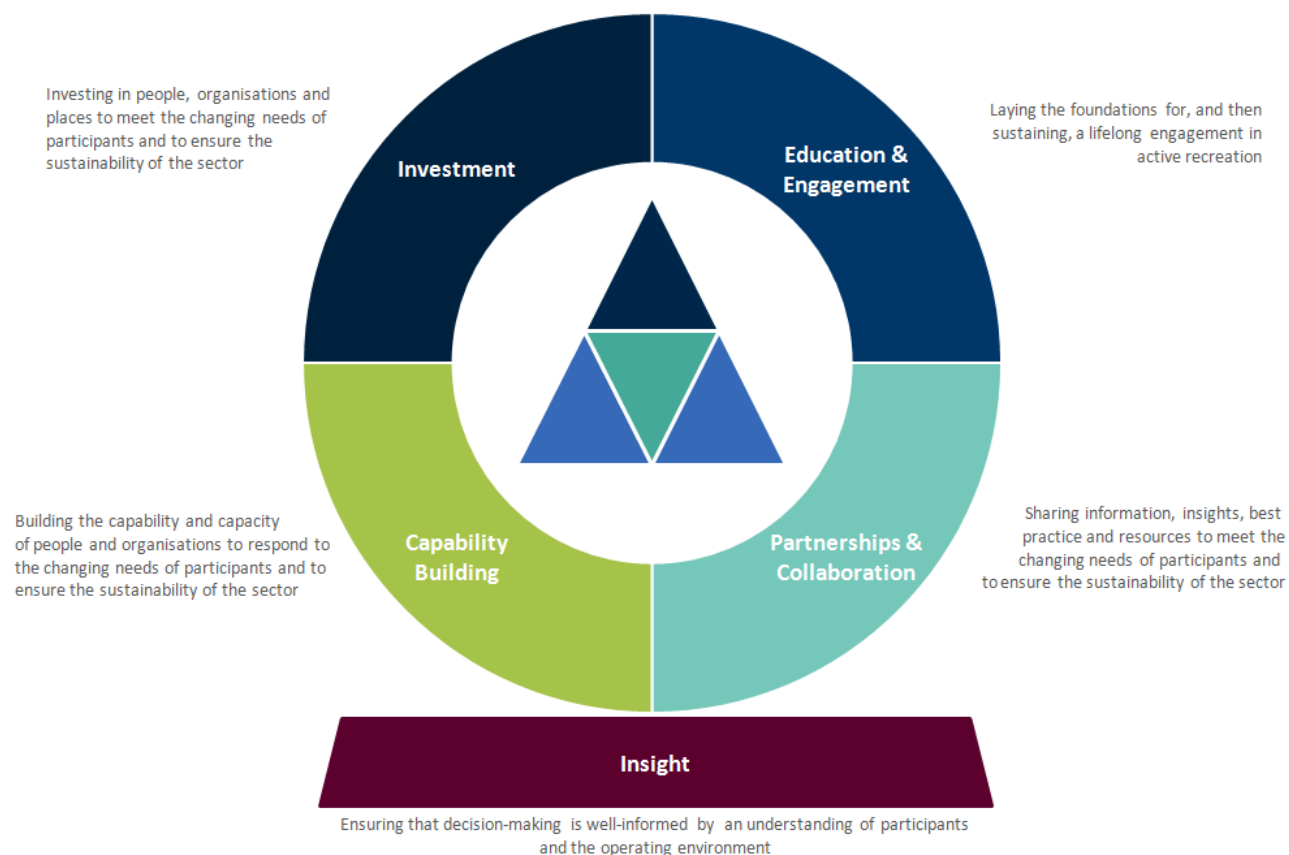
The Planning Framework presented in this document starts with a 10-year vision for active recreation that will see: -

- More people active, more often, for life
- A wide range of recreation opportunities available for everyone, regardless of their age, income, culture, physical ability, place of residence or other factors
- The value of active recreation widely understood
- A diverse network of individuals, groups and organisations working effectively together to meet the active recreation needs of New Zealanders



## Strategic Priorities for the Sector

In support of this vision, the Framework lays out **four strategic priorities** - Education & Engagement, Partnerships & Collaboration, Capability Building and Investment – underpinned by **Insight** to inform decision-making. Following discussion of these strategic priorities with providers from across the sector, a set of recommendations has been outlined.



It is recommended that Sport NZ, other government agencies, and other partners and providers across the sector now use this Framework to guide and implement their own action plans. The resulting force of collective action will help to future-proof the active recreation sector.

# Introduction



Described as generally non-competitive physical activities undertaken for the purpose of wellbeing and enjoyment, active recreation\* represents a significant component of community sporting activity in New Zealand. Participation in active recreation is widespread and the sector encompasses an increasingly diverse network of providers offering services that range from delivery of programmes and events, to education, training, advocacy and other support services.

Sport NZ is Government's lead agency for sport and active recreation. Active recreation goes to the heart of the organisation's vision as articulated in its Community Sport Strategy 2015-2020 - "Enriching lives and inspiring a nation" – and its mission to see more kids and more adults involved in sport and recreation.

The current project was coordinated by Sport NZ on behalf of a wider group of 14 government agencies with an interest in active recreation and its outcomes. As outlined in the original Terms of Reference, this project was designed to 'future-proof' the sector by achieving: -

an aligned and sustainable active recreation sector

that meets the changing needs and expectations of participants

and

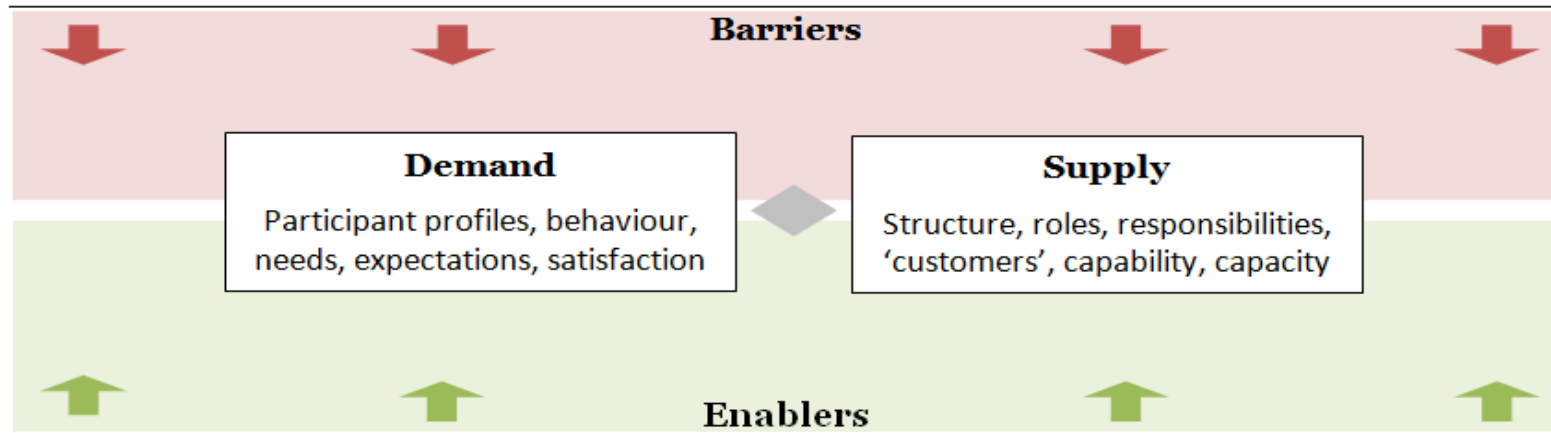
is a valued component of Community Sport

The project has involved a number of stages, as outlined on page 9. This report brings together the findings of all stages to arrive at a vision, goals and a set of strategic priorities as a framework for the sector moving forward.

It is hoped that Sport NZ, other government agencies, and other partners and providers across the sector will now use this framework to guide and implement their own action plans and, through the resulting force of collective effort, future-proof the active recreation sector.

\* Active recreation is a term used by Sport NZ and other groups and organisations across the sector. However, it is not a term that is widely used or well-understood by the general public. More appropriate terminology has been explored through the current project, as discussed further on page 11.

This project set out to explore the active recreation landscape and to identify how participant needs and expectations might be (better) met, both now and into the future.

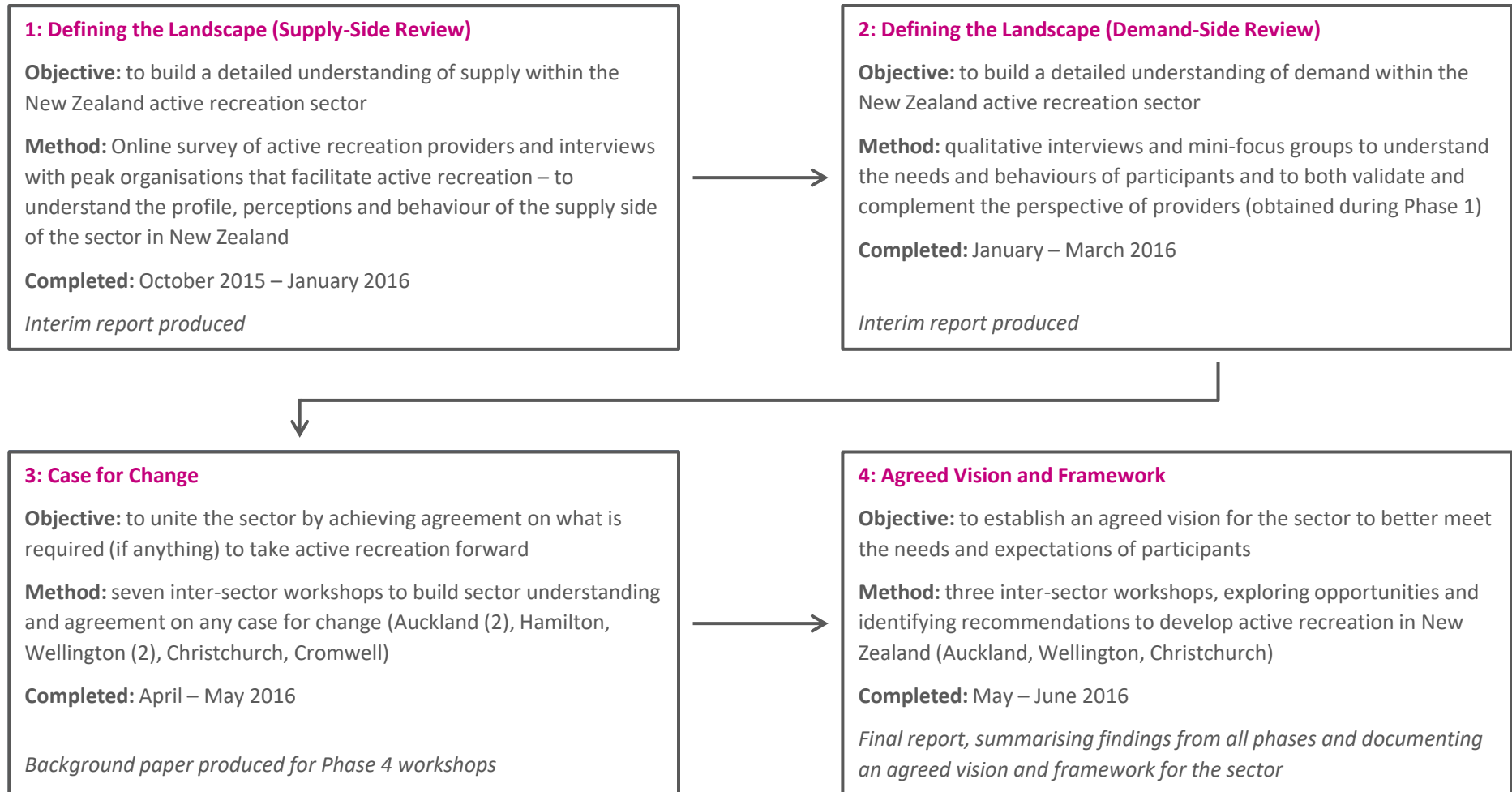


This required that, through the project, we develop: -

1. an understanding of participant needs and expectations, both current and forecast;
2. an understanding of current providers (roles, responsibilities, purpose, capability, capacity) and funder systems (Government and philanthropic);
3. an understanding of how the needs and expectations of participants are currently being met and any gaps and overlaps that may exist in service provision; and
4. an understanding of the operating environment and the various political, economic, social and technological factors - such as new health and safety requirements, funding criteria, demographic changes and new technology – that are impacting the sector (and therefore participants) as enablers or barriers.



The project involved four phases, with each phase building on the findings of earlier phases.



# The Active Recreation Sector



## What is Active Recreation?

‘Active recreation’ is a term used by Sport NZ and other groups and organisations across the sector. It is not a term that is either widely used or well-understood by participants or the general public.

In the Terms of Reference for this project, active recreation was defined as “generally non-competitive physical activities undertaken for the purpose of well-being and enjoyment” (encompassing also the learning and development opportunities associated with play). This was assumed to include activities that occur in built, landscaped and natural environments (including outdoor recreation, fitness/exercise, community recreation, aquatics, informal activity and play); activities that are undertaken both by individuals and by groups; and activities that occur both with and without the active involvement of a ‘provider’ group or organisation (i.e. independently).

However, qualitative research undertaken as part of this project indicates that people don’t talk about ‘active recreation’ as distinct from ‘sport’ <sup>(1)</sup>. They talk instead about a spectrum of ‘physical activities’ that range from the ‘structured’ to the more ‘flexible’.

- **Structured activities** have clear rules and boundaries around how people participate, when they participate, where they participate and with whom they participate. Associated with structured activity is commitment – to one’s own goals or objectives, or to a team, coach or manager - and a sense of obligation, even if only to oneself. The rules and measurement of performance that are typically associated with structured activity also allow people to challenge themselves and to compete with others, and ultimately to achieve goals or to win. While the relationship is not absolute, ‘structured activity’ is broadly synonymous with sport.
- **Flexible activities** allow people to participate in the way they want, when they want, where they want, and with whom they want – without commitment or obligation to others. Again while not absolute, ‘flexible activity’ is broadly synonymous with active recreation.

This spectrum of physical activity is illustrated overleaf, using football as an example.



Competitive league



A social game organised by workmates



Play

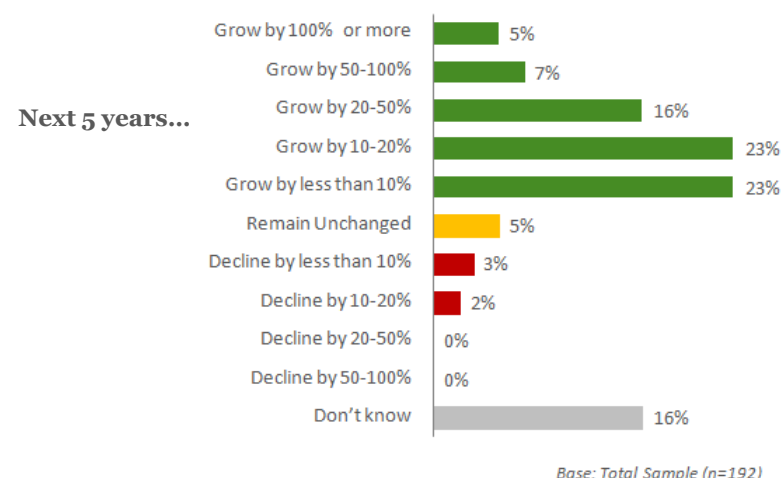
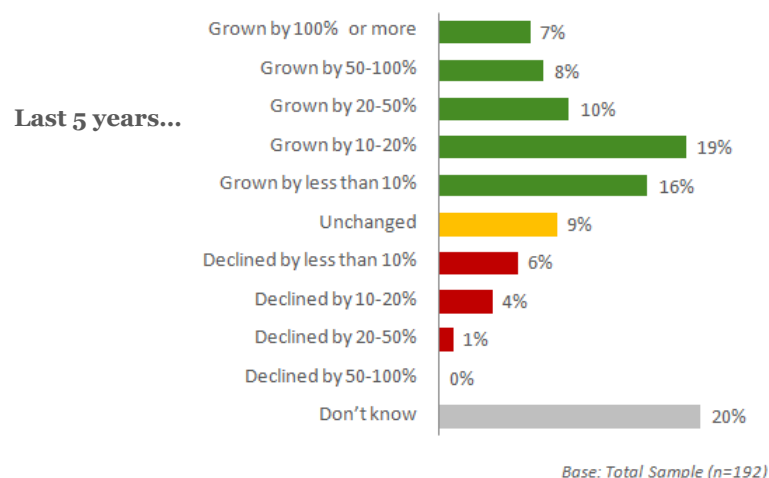
Through this project we have moved to adopt 'participant-centric' language where practical: talking of 'physical activity' (undertaken primarily for recreational purposes) instead of 'active recreation'. This aligns with the definition of 'sport and active recreation' used in Sport NZ's new participation measure: 'physical activity undertaken for the purpose of sport, exercise and recreation'. For simplicity's sake, the term 'physical activity' has been used as shorthand for 'physical activity undertaken primarily for recreational purposes' in some instances.

## Participation

Sport NZ's **Active New Zealand Survey**<sup>(1)</sup> indicates that the majority of adults take part in sport and recreation each week (most of these on at least 3 days a week). Considered over a 12-month period, the most popular activities undertaken by New Zealanders in 2013/14 were 'recreational' in nature: walking, swimming, cycling, equipment-based exercise, fishing, jogging/running and Pilates/yoga. By far the largest proportion of Active New Zealand Survey participants (98%) took part in activities on a casual basis, on their own or with others. This compared with the next largest group (22%) which took part in activities through regular club competitions. Sport NZ's **Young People's Survey**<sup>(2)</sup> indicates that the majority of children aged 5-10 years (8 out of 10 boys and 7 out of 10 girls) spend more than three hours a week participating in sport and recreation in the form of casual games and activities (described as "mucking around").

As context for this project, the Active New Zealand Survey and the Young People's Survey highlight just how significant 'active recreation' is as a component of Community Sport.

While not disaggregated to consider active recreation alone, a recent report on national trends<sup>(3)</sup> highlights declining levels of adult participation in sport and active recreation over a 16 year period. This trend is most pronounced amongst young adults (aged 18-24 years), and amongst people identifying as Māori, Pacific and 'other' ethnicities, although participation amongst Pacific peoples has actually increased if walking is excluded. Adults living in lower income households also experienced greater rates of decline than the national trend. However, the majority of providers contributing to the current project indicated that participation in their sphere of activity had grown in the last five years, and the great majority also expected this growth to continue in the future<sup>(4)</sup>.



The providers anticipating growth over the next 5 years attributed this to: -

- A growing population (and, especially, an active aging population with more time to participate in recreational activities);
- The stimulatory effects of a competitive marketplace;
- A better understanding of participant needs within the sector;
- New facilities and infrastructure which increase accessibility to recreational opportunities (e.g. cycling/mountain biking trails); and
- A perceived trend of New Zealanders moving away from participation in sport to participation in more flexible forms of physical activity.

The latter – a shift from structured to more flexible physical activities - was attributed both to changes in the way people live their lives (with more and competing demands on time) and to changes in peoples’ needs and what they value. This is in turn driven by wider societal change, including an increasing older demographic and the growing cultural diversity of New Zealand’s population.

Those expressing the counter view - that participation in physical activity (both structured and flexible) is declining – attributed this to: -

- Trends in the use of technology (particularly by younger people) – i.e. more ‘screen time’ impacting physical activity;
- An erosion in the traditional New Zealand outdoor recreation ethos;
- The increasing prominence of new immigrant communities for whom physical activity for recreation may not be a priority; and
- General economic trends that have seen more New Zealanders constrained in their choices by the disposable income available to them.

This diversity of perspectives suggests that providers may be observing different trends depending upon the sectors of the community they serve and the types of activities with which they work. Regardless of perspective however, it is reasonable to conclude that societal change is and will continue to drive shifts in participant needs and behaviour, and demand change of those whose role it is to serve the ‘active recreation’ participant.

Sport NZ’s new participation measure (currently in development) will provide empirical evidence on levels of participation in physical activity for the purpose of sport, exercise and recreation, and a basis against which to measure change over time.

## Influences and Enablers of Participation

The qualitative research undertaken for this project indicates that participation in physical activity is driven both by intrinsic and extrinsic factors<sup>(1)</sup>. On the surface, people are intrinsically motivated to be active by the fun and enjoyment this affords and by the perceived health benefits. However, underlying these factors, participation satisfies more fundamental needs for challenge and achievement, stimulation, social interaction, belonging, relaxation and stress relief, and improvement of self-image and self-confidence. Other Sport NZ work on 'Play' reveals that young people also discover and make sense of the physical environment through which they move as they play.

While one need may dominate an individual's approach to physical activity, people take part in different activities at different times with different people and in different ways to satisfy the variety of needs they may have.



### A single activity can satisfy many needs E.g. swimming...

1. Someone looking for challenge and achievement on an individual basis may take part in an ocean swim series or triathlon
2. Someone looking to socialise with people who have similar interests may choose to join a swim team or group
3. Someone looking for some family time may head to the beach for a swim with their children (connecting at the same time with our physical environment)
4. Someone looking to improve their physical fitness while taking time out after a stressful day may choose to swim laps at their local pool after work



The research indicates that fitness and basic skills are **enablers** of participation and that exercise is any activity undertaken with the intention of improving fitness. While not everyone who participates in physical activity is intrinsically motivated by health benefits, improved health and a greater overall sense of well-being can nonetheless be considered **outcomes** of participation, both at individual and group or community levels.



From an extrinsic perspective, **influencers** and **enablers** of participation include pre-schools and schools; parents and family members; friends/peers; work colleagues; health professionals; and community, not-for-profit and commercial providers of active recreational facilities, programmes, events and services.

The role played by these groups can change at different stages in an individual's life, although the influence of friends/peers appears to be a constant throughout life.



## Barriers to Participation

The qualitative research undertaken for this project indicates that barriers to participation may also change throughout an individual's life (although **not having friends/peers to participate with** appears to be a barrier regardless of life stage). Other barriers to physical activity include fear of failure or the risk of injury; health/physical limitations; lack of fitness/skills (real or perceived); and the simple loss of interest or motivation (for example, when an activity becomes too difficult or too demanding as sometimes appears to be the case when teenagers are asked to 'specialise' in a given sport).

When time, money and energy are in limited supply, physical activity may also be de-prioritised relative to other interests or commitments that an individual has, such as study, work, family, other care responsibilities, and other leisure activities. Physical activity may also be sacrificed if an individual's family or other influencers (such as church, cultural or community leaders) deem other activities more important.

Participation in physical activity appears to be at particular risk during periods of transition from one life stage or situation to another (such as from school to work or further study, or from pre-children to having children) when peer groups, routines and support structures shift and when changing needs, new interests or commitments may also demand changes in physical activity.



No friends to participate with



Other commitments take priority (time)



Other commitments take priority (money)



Injury/Risk of injury



Health scares/ poor health



Too difficult or demanding



Safety concerns



Fear of failure

Providers identified 'understanding participant needs' as a critical enabler for the sector (refer to page 22). Along with other research available through Sport NZ, this qualitative research provides a useful framework for the design, development and promotion of facilities, programmes and services that will meet the needs and expectations of participants. Further research will be needed to quantify motivational 'segments' of the population, to map these segments to demographic profiles, to confirm the relative importance of external influences and barriers (including at different stages of an individual's life), and to track how participation by segment changes over time.

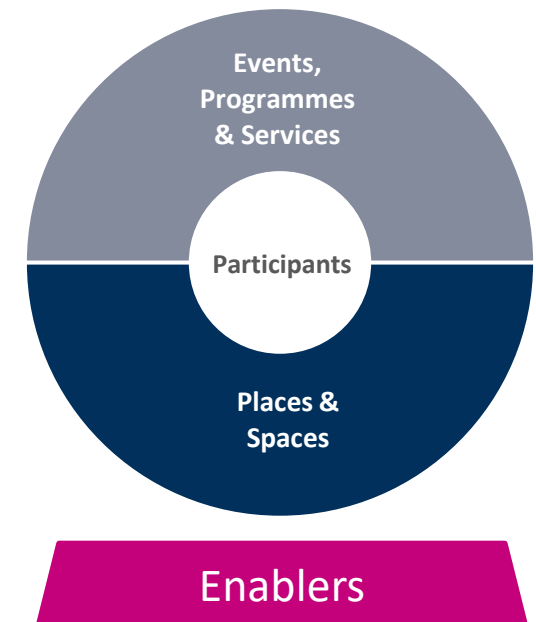
## What is the Active Recreation Sector?

As the starting point for this project, the active recreation **sector** was described as a diverse network of organisations and groups (both structured/formalised and unstructured), as well as individuals, offering a range of services and delivery models – including programme delivery/classes, education/training and advocacy/support. The relevant organisations and groups were described as having a mix of professional staff and/or volunteers and being national, regional and/or local in their focus. A number of sub-sectors were identified in the Terms of Reference for the project: Fitness & Exercise, Outdoor Recreation, Aquatics, Community Recreation, Informal Activity and Play.

However, these categories belie the complexity and sheer breadth of the sector. As is the case with other complex sectors (such as the tourism sector), it may be most useful to understand the sector by reference to the **consumer** (in this case “the active recreation participant”) and not the **producer** of the relevant products or services (in this case “the active recreation provider”). In other words, the sector could be said to include **all organisations, groups and individuals that deliver or facilitate the delivery of experiences to people participating in physical activity (for the primary purpose of recreation).**

Using this definition, the sector would include all people, groups and organisations responsible for the places and spaces in which people actively recreate (in many instances independently); those involved at the frontline in the development and delivery of events, programmes and services; and those who make it possible for these individuals/organisations/groups to operate.

- **Places and Spaces:** central government; local government; private sector (e.g. gyms/fitness centres, tourism operators, golf clubs); schools; community, sport, recreation and cultural groups which own or operate facilities used by participants
- **Events, Programmes and Services:** schools; local government; private sector; not-for-profits; community, sport, recreation and cultural groups
- **Enablers:** policy makers (central/local government), funders, educators, investors, advocates, facilitators



Research undertaken for this project confirms that the supply-side of the sector is made up of a diverse mix of sector associations, national and regional sports and recreation organisations, regional sports trusts, not-for-profit organisations, community groups, cultural groups, clubs, educators, commercial entities, central and local government agencies and others. Many of these entities work alongside others at different times, in different contexts and on different projects, although activity is not always well-aligned<sup>(1)</sup>.

In total, 70% of the providers responding to the online survey undertaken during Phase 1 of this project identified their organisations as incorporated societies or charitable trusts.

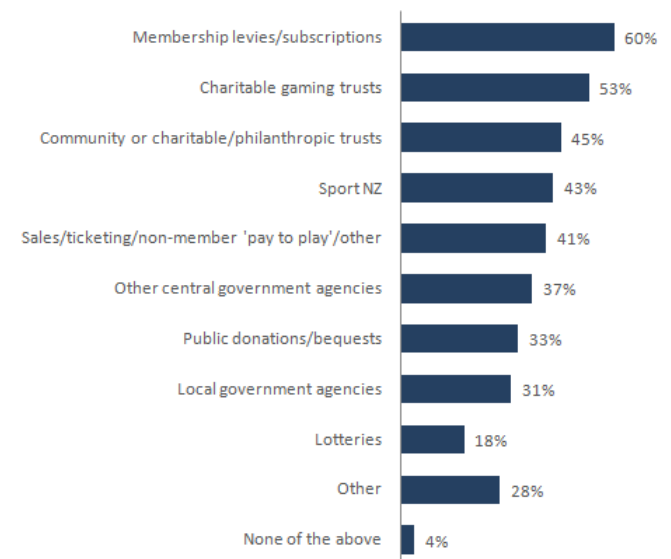
Many organisations and groups indicated that they were reliant on a variety of income sources, including membership levies/subs, funding from charitable gaming and community trusts, commercial revenues (sales, ticketing, pay to play and other), and funding from central or local government agencies.

Most organisations and groups responding to the online survey (80%) had 'growing participation' as their core objective (along with the delivery of programmes and services). Others consulted for Phase 1 of the project had a primary focus on the safety and quality of participation or on maximising the downstream benefits of participation (be these health, educational, cultural, social or financial).

The **purpose** of the organisations and groups contributing to this project was typically expressed in relation to the outcome of "a healthy community".

leadership  
increase participation advocacy  
**facilitate healthy community**  
build capability provide facilities (for recreation) commercial business  
sport & rec admin/delivery

## More than 3 funders on average...



Base: Total Sample - excluding government agencies (n=188)  
Multiple Responses Allowed

## Who does the sector serve?

Including those organisations consulted one-on-one during Phase 1, more than 200 'supply-side' organisations and groups contributed to this project. This included Territorial Authorities, Regional Sports Trusts, National Sports Organisations, National Recreation Organisations, recreation clubs, industry/sector associations, commercial operators and government agencies. Considerable effort was made to involve as wide a range of providers as possible (including dance organisations, tourism operators, cultural groups and others not historically recognised as part of the 'active recreation sector').

Asked to define the profile of participants served by their organisation/group, the majority of respondents to the survey undertaken during Phase 1 of the project identified multiple age, life stage, ethnic, socio-economic and/or location-based groups.

However, some notable gaps were apparent in the profile of the groups served by participating providers: -

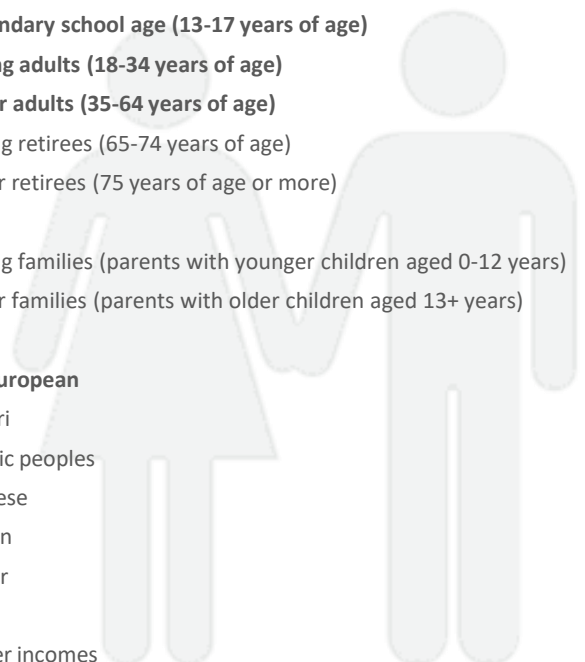
- Young children (and notably those less than 5 years of age)
- Older people (those aged 65 years or more)
- Pacific peoples, Chinese, Indian and other ethnic groups
- People on lower incomes
- People in rural communities

In later stages of the project, a number of these groups were identified as 'strategically significant' to the sector: for example, pre-school-aged children (to lay the foundation for lifelong participation in active recreation) and Pacific peoples, Chinese, Indian and other ethnic groups (recognising the growing diversity of New Zealand's population).

Addressing the gaps identified was considered a priority for the sector going forward.

## Groups Served by Participating Providers

*Which of the following best describe the people who participate in the sector(s) served by your group?*



Early childhood (0-4 years of age)	30%
Primary school age (5-12 years of age)	68%
<b>Secondary school age (13-17 years of age)</b>	<b>81%</b>
<b>Young adults (18-34 years of age)</b>	<b>83%</b>
<b>Older adults (35-64 years of age)</b>	<b>80%</b>
Young retirees (65-74 years of age)	59%
Older retirees (75 years of age or more)	44%
Young families (parents with younger children aged 0-12 years)	68%
Older families (parents with older children aged 13+ years)	72%
<b>NZ European</b>	<b>93%</b>
Māori	76%
Pacific peoples	62%
Chinese	51%
Indian	46%
Other	16%
Lower incomes	62%
<b>Middle incomes</b>	<b>85%</b>
<b>Higher incomes</b>	<b>71%</b>
<b>Urban</b>	<b>89%</b>
Rural	61%

*Base: Total Sample - excluding government agencies (n=188)  
Multiple Responses Allowed*

## Challenges

As a rule, the sector is extremely positive about the prospects for growing participation in active recreation, believing there is already untapped demand.

At the same time, a number of challenges were identified by the supply-side individuals, groups and organisations consulted during Phase 1 of this project. Most prominent amongst these challenges were the following.

- A more diverse population and a growing range of recreational opportunities – but fewer opportunities to interact with people via organised events and club networks – are increasing the degree of complexity for those serving the sector.
- A more demanding regulatory environment, with new Health & Safety legislation and Adventure Activities regulations (for example), is seen to be impacting those delivering services to participants.
- Challenges securing and retaining funding, especially for a term that supports long-term planning and progress on strategically important projects. The complex funding landscape – where organisations receive funding from multiple organisations – is said to introduce a further degree of challenge when it comes to deciding strategic and operational priorities.
- Fragmentation, duplication and lack of alignment across the sector. This is said to be exacerbated by competition for funding and the ‘unhelpful’ behaviour this drives: for example, when organisations commit to work mainly to secure or retain funding, regardless of whether the work is truly important or already being undertaken by another party.
- Poor governance, sometimes compounded by the demands of members and/or a constitution that is out of step with the requirements of the current (or forecast) operating environment.
- Reliance on volunteers, combined with a (perceived) erosion in volunteerism.

# Supply of Active Recreation

## Enablers

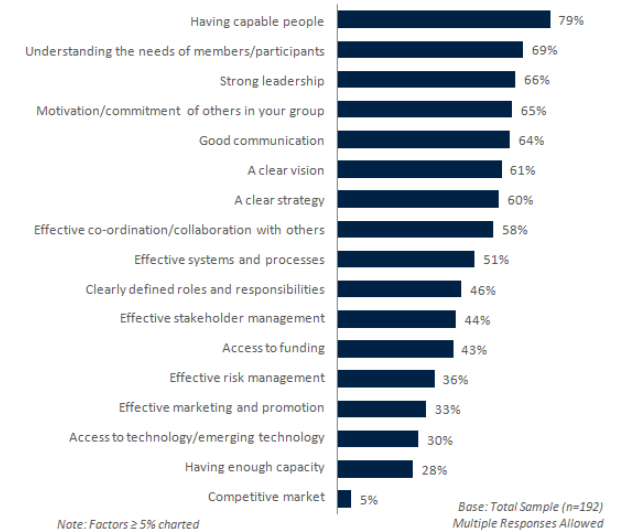
As supply-side **enablers**, the providers consulted for this project identified **capable people** as the most significant factor in achieving their goals. Also considered key enablers were an understanding of the needs of the audience served by an organisation, strong leadership, motivation/commitment and good communication.

While still identified by more than 40% of the people who responded to the supply-side survey during Phase 1 of the project, it is worth noting that ‘access to funding’ lagged some way behind other factors as an enabler for organisations in the sector.

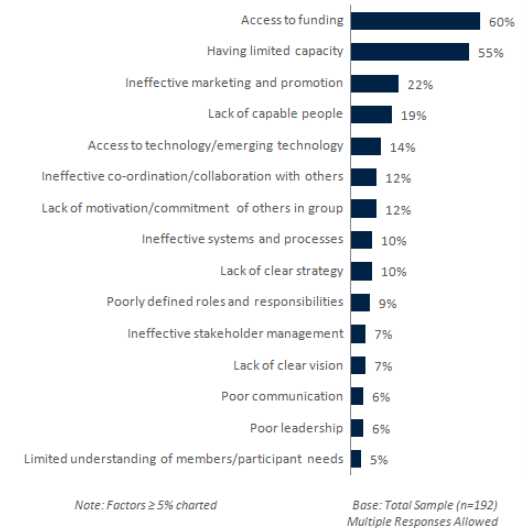
## Barriers

While not always identified as a key enabler, access (lack of access) to funding emerged as the most significant barrier to organisations achieving their goals. Related to this was capacity constraints.

### Enablers



### Barriers



# Future-Proofing the Active Recreation Sector



A case for change might be found in falling levels of participation in active recreation or in varying levels of participation across the population. Either scenario might suggest that: -

- Participant needs are not being met;
- Participant needs are not being met as effectively as has been the case in the past; and/or
- Physical activity (primarily for the purpose of recreation) is not as compelling as alternative uses of time/energy/expenditure.

A recent report on national trends<sup>(1)</sup> shows declining levels of adult participation in sport and active recreation over a 16 year period. However, the data is not currently available to support a conclusion that levels of participation in active recreation are declining. Indeed, the perspective of providers consulted for this project would support the counter view. At the same time, there is evidence in Sport NZ's Active New Zealand Survey<sup>(2)</sup> that participation in sport and active recreation is lower than average amongst women, older adults, Māori, Asian peoples, people living in less affluent communities and people living outside of the major urban centres. Sport NZ's new participation measure will confirm the extent to which this is also the case when physical activity (primarily for the purpose of recreation) is considered independent of sport.

In the meantime, the Active New Zealand survey findings are reflected in the perspective shared by providers who participated in the current project<sup>(3)</sup>. As outlined on page 20, some notable gaps were apparent in the demographic profile of the groups served by participating providers:

- Young children (and particularly those less than 5 years of age)
- Older people (those aged 65 years or more)
- Pacific peoples, Chinese, Indian and (notably) other ethnic groups
- People on lower incomes
- People in rural communities

The extent to which varying levels of participation are the result of 'failure' to meet the needs of under-represented groups (e.g. through the types of facilities and services offered, the price at which these are offered, or where they are offered), rather than being a matter of simple preference, is not known at this stage. However, feedback from providers contributing to this project does suggest that there is scope to better meet the needs of these and other participants. In this respect, there is general support of there being **a case for change**.

(1) Sport and Active Recreation in New Zealand. Sixteen Year Participation Trends 1998-2014 | Sport New Zealand

(2) Sport and Active Recreation in the Lives of NZ Adults | 2013/14 Active New Zealand Survey Results | Sport New Zealand  
<http://www.sportnz.org.nz/assets/uploads/attachments/managing-sport/research/sport-and-active-recreation-in-the-lives-of-new-zealand-adults.pdf>

(3) Future Proofing the Active Recreation Sector | Interim Report (Supply-Side Review) | Angus & Associates, February 2016



A first series of workshops was run around the country during April 2016, the purpose of which was to play back to the sector the findings of Phases 1 and 2 (Supply- and Demand-Side Research) of the current project and to invite discussion on “a case for change”: specifically, whether change was needed and, if so, in what respects.

While this view was not unanimous, most people who participated in the April workshops agreed that there was a case for change. Some felt that change was needed to address current supply- and/or demand-side problems: for example, ‘unhealthy’ competition between providers, poor governance, duplication of effort, failure to turn around what they saw as declining levels of physical activity, failure to reduce levels of childhood obesity, or failure to adequately address social/economic/cultural barriers to participation in active recreation. Others felt that change was needed simply to ensure that the sector continued to meet the **changing needs** of participants.

That participant needs are changing was widely agreed: whether because of the growing cultural diversity of New Zealand’s population, growing social inequality, the increasing complexity of active recreational opportunities available, the increasingly pervasive nature of social media and technology, or growing demand for flexible ‘when, where and with whom I want’ active recreation in preference to more structured, club-based activity.

Asked what change was needed, workshop participants focused on issues relating to: -

- Education and ongoing engagement with active recreation participants (and non-participants);
- Partnerships and collaboration between organisations across the sector;
- The capability and capacity of organisations across the sector (particularly in regard to how these organisations might respond to the changing needs of participants); and
- Investment in people, organisations and infrastructure.

These themes – which reflect a central focus on participants and the key enablers and barriers for the supply side of the sector - became the focus of breakout sessions at a second series of workshops held in Auckland, Wellington and Christchurch in late May and early June 2016. The objective of this final series of workshops was to agree a vision and a set of strategic priorities for the sector.

# Strategic Priority 1: Education and Engagement

*Laying the foundations for, and then sustaining, a lifelong engagement in active recreation*

Because of its link to health and well-being, many working in the active recreation sector would like to see people develop a life-long love of physical activity. This means engaging with children in the early years and keeping them involved through their teens and into and throughout adulthood. It means supporting people through periods of transition, and reaching groups under-represented amongst those participating in active recreation (including Māori, Pacific Island and Asian communities, and those in lower income groups).

An increasingly diverse population only adds to the challenge, as does the apparent shift from structured, club-based sporting activity to more flexible and independent participation.

Workshop participants were asked to consider how the sector could reach, communicate and stay connected with this increasingly diverse set of participants (and non-participants) – laying the foundations for, and then sustaining, a lifelong engagement in active recreation.

Priorities as agreed ➡

## Agreed Priorities: Education & Engagement

- Make physical activity a national priority (a whole of government approach to telling the value story)
- Make play a national priority as the first step toward a more active nation
- Make physical activity an individual priority (awareness and access to opportunities)
- Develop and implement a life stage/needs-based marketing plan for active recreation (national)
- Educate and empower key influencers (parents, educators, health professionals), including on the importance of play and the benefits of risk-taking
- Focus on play and movement in early childhood education/ early school years (learning through movement, focus on physical literacy)
- Prioritise PE and EOTC in the school curriculum (supported by additional resource)
- Shift focus from/balance focus on competitive and team-based activities in school to include active recreation and basic skill development
- Generate and share insights on participant needs/changing participant needs/drivers and barriers to upskill the sector
- Embrace technology and social media to promote opportunities, communicate with participants and facilitate delivery of programmes/services
- Communicate with new immigrants via community leaders, ensuring that culturally-relevant active recreation opportunities are accessible
- Promote physical activity in the workplace (environment, work-life balance, activities accessible within the workplace) – role modelled by the sector

## Strategic Priority 2: Partnerships and Collaboration

*Sharing information, insights, best practice and resources to meet the changing needs of participants and to ensure the sustainability of the sector*

In Phase One of this project, funding was identified as a constant challenge for organisations and groups working across the sector (from central government agencies to regional sport and recreation organisations). At the same time, providers cited instances of duplication/overlap and gaps in service provision.

Overall, there was a sense that organisations didn't share information or resources to the extent that they might, particularly given common needs and shared objectives.

Some of the arguments given for partnering and greater collaboration (where common needs, common audiences and/or common objectives exist) were: -

- Saving money/not wasting time or money duplicating effort;
- Synergies/efficiencies to be gained by working together (e.g. combined voice, combined reach);
- Delivering more value for participants with reduced 'back office' costs (i.e. a stronger value proposition for members/participants);
- Making best use of a limited pool of funding; and
- Gaining access to expertise, experience, or knowledge that might otherwise not be available.

Phase Four workshop participants were asked to consider how they thought organisations could share information, insights, best practice and resources to meet the changing needs of participants and to ensure the sustainability of the sector.

Priorities as agreed ➡

### Agreed Priorities: Partnerships and Collaboration

- Collaboration needs to be facilitated, supported and incentivised (co-ordinated at central government level – e.g. aligned to a common vision, common outcomes, consistent KPIs)
- Collaboration is needed at central government level (e.g. a whole of government understanding of the value of active recreation, a coherent approach to funding, a commitment to a common vision and set of goals)
- Establish hubs – physical and virtual (shared back-office services; access to expertise – e.g. social media, marketing, technology; shared volunteer pool; common tools and business systems; sharing of knowledge, best practice, systems and resources – including HR and H&S – via a knowledge hub)
- Knowledge hub also to include a central and regional directories of organisations/resources
- Clarity and transparency of roles and objectives is needed to help people make decisions on who to collaborate with (e.g. to identify with whom they share objectives or who they can approach to access specific networks or to find specific expertise)
- Identify and empower individuals and organisations to act as 'relationship brokers' (e.g. RSTs to connect individuals or groups with common needs and objectives, Councils to connect groups with common aims when these are identified via funding/planning processes)

## Strategic Priority 3: Capability and Capacity

*Building the capability and capacity of organisations to respond to the changing needs of participants and to ensure the sustainability of the sector*

If organisations are to respond to demand, and to meet the changing needs of participants, they must have both the capability and capacity to do so. It was in this sense that 'capability' (broadly defined to include 'capacity') was identified both as a key enabler of active recreation (if present) and a critical barrier (if not).

Some of the many questions raised by providers consulted for this project were: -

- Do organisations need more responsive boards to facilitate change?
- Do organisations need support to make constitutional change when this is needed?
- Do organisations need assistance on matters relating to workforce development?
- Do organisations need more support to understand and comply with a changing regulatory environment?
- What support do organisations need to tell the story of their value, and the value of active recreation?
- What support do organisations need to gather, analyse and interpret the information needed for decision-making?
- Do organisations understand how participants' needs are changing, and how they should respond (e.g. virtual clubs, park run, park rugby clubs, self-organised activity)?
- Are new, more flexible, approaches to volunteering needed (to make it easier for people to volunteer, without needing to commit to regular or ongoing involvement)?
- Is further work needed on an overarching educational framework for the sector (encompassing qualifications, training providers and advocacy groups)?

Workshop participants were asked to consider how they thought the capability and capacity of organisations could be built and what were the priorities in this respect.

Priorities as agreed ➡

### Agreed Priorities: Capability and Capacity

- Build shared services/resources – e.g. a centralised pool of consultants/experts such as accountants, lawyers
- Build a virtual centre of excellence through which organisations/groups/individuals/volunteers can access the skills and resources they need to drive active recreation at a community level (e.g. Health & Safety information/templates; help with other legal issues; research and evaluation systems and resources to help organisations understand their participants, non-participants and volunteers, and to monitor, evaluate and review actions taken; a toolkit for 'activators' – taking informal groups into a more formal environment; ideas for activating spaces and places; workforce planning templates and resources; webinars)
- Actively encourage and support the merging of clubs/groups/organisations where this makes sense (e.g. to share multi-use facilities, to share admin and other resources)
- Build/promote local community directories of active recreation opportunities, linking these to the groups through which they can be accessed
- Build a shared pool of volunteers, targeting universities/students to create a pathway into the sector and older people with more time available
- Focus on building the capability of peak bodies to lead and provide support for their sectors
- Focus on building governance capabilities across the sector

## Strategic Priority 4: Investment

*Investing in people, organisations and places to meet the changing needs of participants and to ensure the sustainability of the sector*

During the Phase Three workshops and in the earlier round of consultation with providers, investment in the active recreation sector emerged as a key concern. While workshop discussions often centred on the funding of organisations serving the sector – including NROs, RSTs and others – it was acknowledged that this funding (by Sport NZ, Community Trusts and others) is only one form of investment in the sector. Other investors in active recreation include the Department of Conservation, Regional Councils and Territorial Authorities (which invest in places and spaces used for active recreation), privately-held businesses (which invest in fitness centres and other infrastructure, for example) and agencies which provide funding for support services (e.g. education, safety and search and rescue services). It was also noted that participants make a significant investment in their own active recreation and in the active recreation of others (e.g. children and older family members).

Similarly, while ‘investment’ can refer to financial contributions, it was suggested that non-financial contributions should also be considered as an investment in the active recreation sector: for example, time and resources committed to research, education, other support services, and advocacy on behalf of the sector.

The following summary of discussions was drawn from the Phase Three workshops and provided as a starting point for discussion in the Phase Four workshops.

➤ Change is needed to the current organisational funding model because: -

- the current model drives ‘unhelpful’ behaviour by organisations vying for funding;
- funding should be allocated based on participation and not membership (membership is no longer a useful measure of ‘engagement’);
- funding should be targeted to outcomes and not outputs;
- funding should be directed to increasing opportunities/dismantling barriers to access for participants (and this might mean investing in infrastructure, for example, rather than organisations);
- communities should decide how they want funding directed;
- funding on an annual cycle undermines work on longer-term objectives;
- it would be helpful if funders had a common understanding of priorities for the sector; and
- organisations need to consider ways of becoming self-sustaining (e.g. NSO partnering with event manager to take a share of entry fees in exchange for promotional and other support).

*Continued overleaf...*

## Strategic Priority 4: Investment (continued)

- Change is needed in regard to local government investment in infrastructure because: -
  - active recreation requirements should be integral to town planning;
  - an understanding of tomorrow's active recreation participant should underpin long-term planning activity;
  - infrastructure should be flexible to meet the diverse and changing needs of participants (e.g. multi-use facilities);
  - with growing demand for easily accessible places and spaces for active recreation, more investment is needed in local community infrastructure (tracks, footpaths, cycle trails, other facilities for informal active recreation – skateboarding, parkour and play); and
  - investment in development is not sufficient - ongoing investment in maintenance is required too.
- The sector needs to demonstrate a) the value of active recreation and b) the value of the contribution made by organisations serving the sector. It is thought that greater understanding of the value of active recreation will drive funding and help to improve the sustainability of the sector. In particular, organisations need to “connect the dots” between what they are doing and the objectives of their funders.

The question put to providers in the final round of workshops was: what are the priorities for investment in people, organisations and places to meet the changing needs of participants and to ensure the sustainability of the sector?

Priorities as agreed ➡

### Agreed Priorities: Investment

- Align funding to the priorities/needs identified by the sector (e.g. identify outcomes required and then fund the organisations that can deliver those outcomes; align funding to participant needs and to dismantle barriers to participation; monitor and evaluate investment based on the outcomes achieved)
- Work to develop a common understanding of sector needs and priorities across government and across the funding community (so that relevant organisations and initiatives are prioritised for funding and those that don't contribute to targeted strategic outcomes are not)
- Target funding to incentivise collaboration and to dis-incentivise duplication
- Invest in peak bodies to support their sectors
- Adopt a policy of longer-term investment that allows organisations to commit to ongoing programmes and services (including in collaboration or partnership with others)
- Recognise the investment of private sector entities and work to attract more investment in the sector
- Actively promote investment in places and spaces that will meet the changing needs of participants (allowing for development and ongoing maintenance, encouraging multi-use facilities – including facilities aligned to larger development projects such as shopping malls and offices and not just sport/recreation clusters)
- Actively promote investment in places and spaces that encourage play and recreation (e.g. green spaces, human playscapes, human streetscapes)
- Involve local/community leaders and enablers (such as health professionals, schools, churches, cultural groups) in the design and delivery of programmes, especially those for low/no-participation communities
- Implement a programme of strategic investment that takes in workforce development, education, research/insights/evaluation and shared hubs/resources
- Invest in marketing active recreation – at both national (value of active recreation) and local levels (the latter in relation to local needs and priorities)
- Invest in early childhood/primary-level education (e.g. every child should know how to ride a bike, swim, tramp, camp)

# A Planning Framework for the Sector





During the final series of workshops (undertaken as Phase Four of this project), providers were asked to share their vision for active recreation and the active recreation sector over a 10-year horizon. While articulated in many different ways, the following emerged as common themes in a long-term vision for the sector.

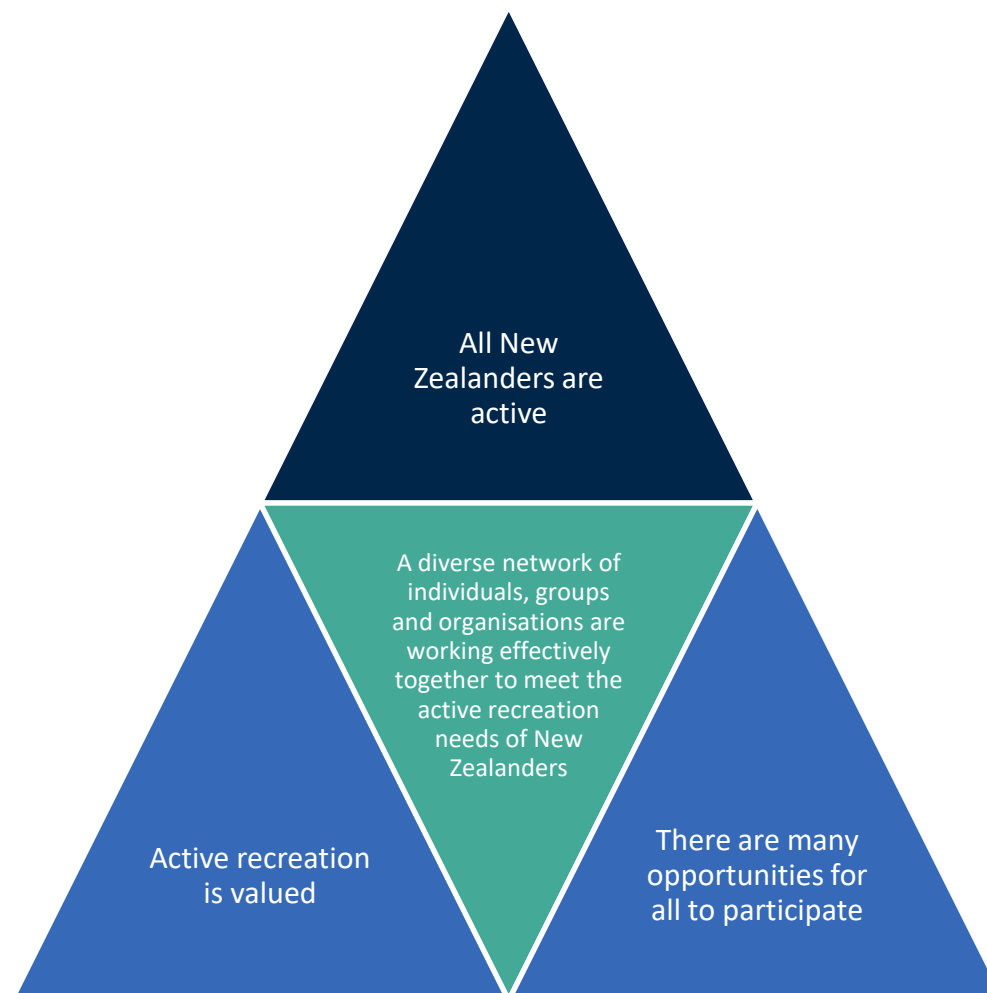
- ✓ The **value of active recreation is known and well understood** by participants, funders, investors, suppliers, enablers/advocates and the wider community (i.e. active recreation makes a vital contribution to the health and well-being of individuals and society)
- ✓ There are **many and varied opportunities to participate** in active recreation (and these are safe, enjoyable, accessible, affordable, and relevant to people at different ages and stages, with different needs and of different cultural backgrounds)

as a consequence of which: -

- ✓ **All people are active** (regardless of age, gender, socio-economic status, ethnicity, place of residence, level of skill and/or fitness) and **active for life**.

Underpinning the above is a strong and diverse network of individuals, groups and organisations that are working effectively together to meet the active recreation needs of New Zealanders.

## A 10-Year Vision





## More people are active, more often, and for life

- Participants have increased
- Non-participants have reduced
- Frequency of participation has increased
- The quality of active recreation experiences is high

## Active recreation is widely valued

- The value of active recreation is understood within the sector
- The sector has developed a coherent 'value story' and is consistent in telling this story
- The value of active recreation is well-understood by New Zealanders and by funders, investors and advocates

## There are many opportunities for all to participate

- All New Zealanders have opportunities to participate in active recreation, regardless of their age, life stage, income, culture, place of residence, physical ability or other factors
- People are aware of the opportunities available and are able to access these opportunities

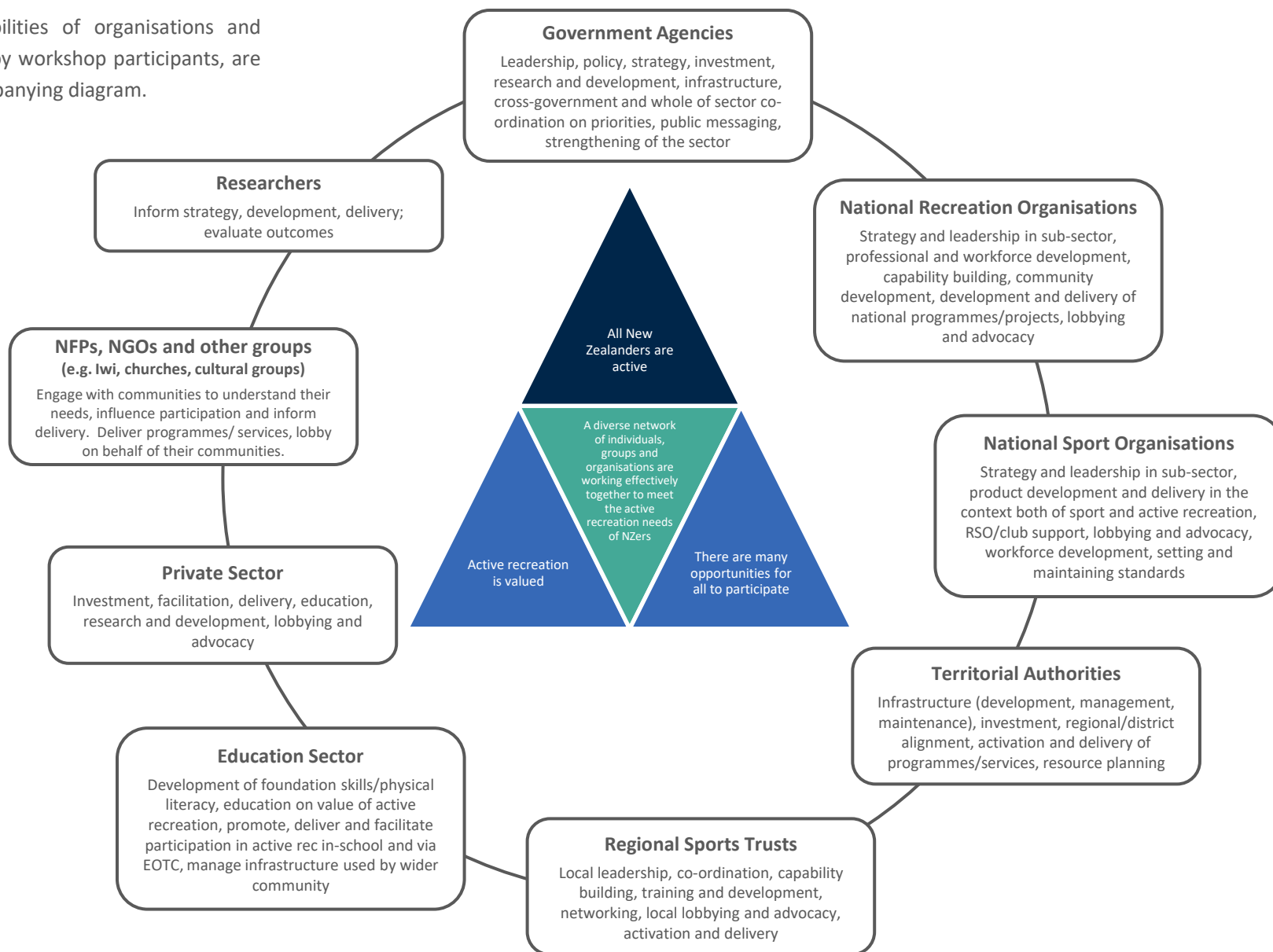


## Individuals, groups and organisations are working collaboratively to meet the needs of the communities they serve

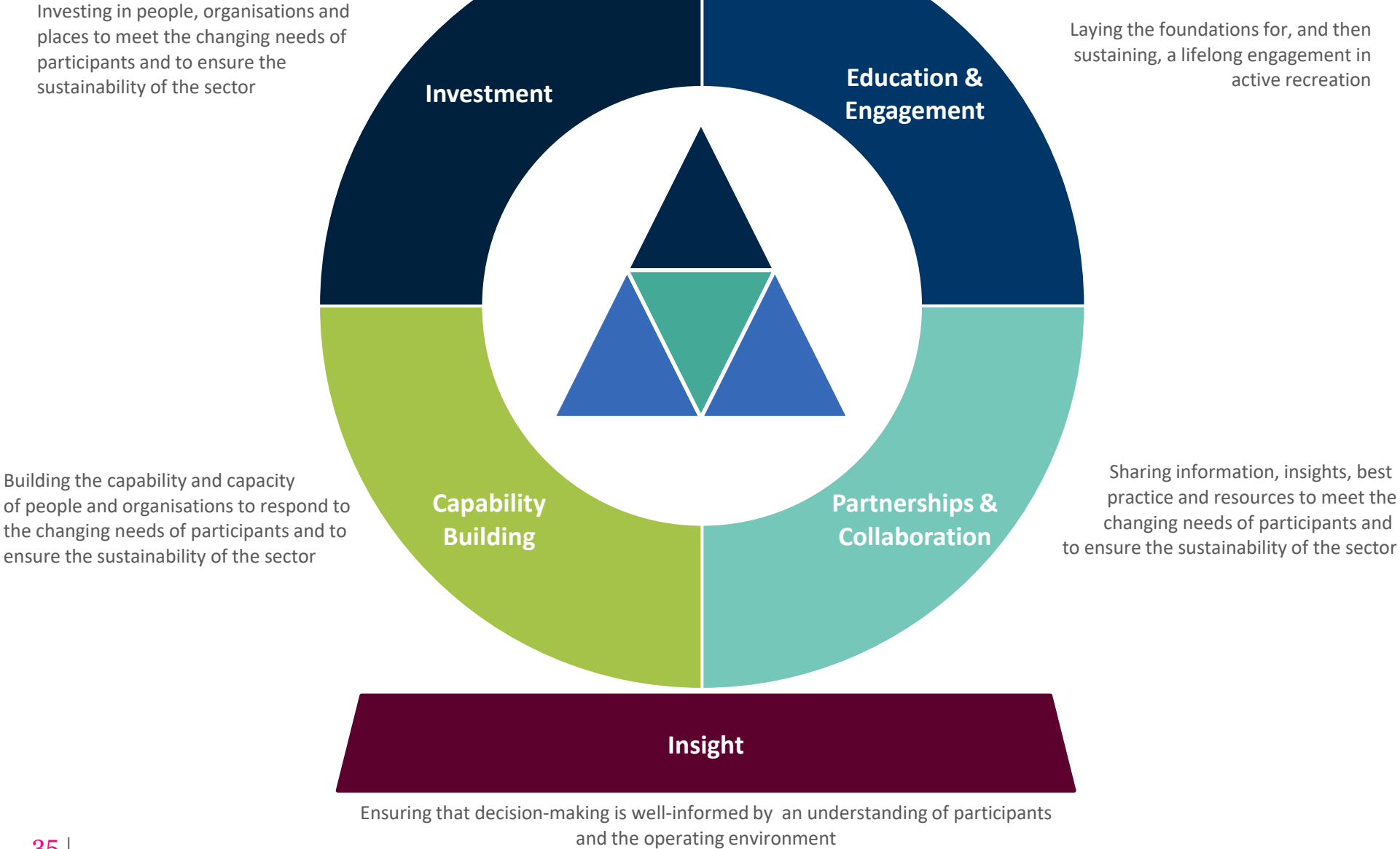
- Participant needs and barriers to participation are well-understood
- Investment and effort is aligned to sector priorities
- Groups and organisations collaborate freely where common needs or objectives exist
- Groups and organisations have the skills, capabilities, funding and other resources they need to meet the needs of the communities they serve

# Roles and Responsibilities

The roles and responsibilities of organisations and individuals, as identified by workshop participants, are summarised in the accompanying diagram.



Strategic Priorities - Summary



## Education & Engagement

- Ensure that there is a clear understanding of the value of physical activity for recreation (i.e. the contribution to the health and well-being of individuals and to society).
- Promote the value of physical activity for all life stages, taking a whole-of-government/whole-of sector approach and aligning this to a broader communications plan regarding the value of the sport and active recreation sector.
- Adopt/support regional and local approaches to the building of participation opportunities (including through social media and technology).
- Develop and implement transition plans to address the drop-off points during key periods of change.
- Develop and implement workplace plans to promote physical activity in the workplace.
- Use events as opportunities to promote and trial new activities for active recreation.
- Identify and consult with migrant community leaders to encourage community-led approaches that target low-participant groups. Encourage the sector to align active recreation provision to these low participant communities.
- Focus on active Play for young people, aligned to a Physical Literacy approach.
- Advocate for active recreation as a contributor to curricular and co-curricular activities within schools, aligned to a Physical Literacy approach.
- Focus on developing the participant skills, knowledge, attitudes and behaviour needed for quality active recreation experiences.

## Capability Building

- Develop active recreation 'hubs' as centres of excellence for people to share good practice, tools, templates, gain expert advice and create efficiencies. Investigate further opportunities for collaboration regarding cross-government data sets, to improve the understanding of the sector and the needs and expectations of participants.
- Improve the governance capabilities of people in active recreation organisations.
- Actively pursue opportunities for people to collaborate, share resources and facilities.
- Build shared volunteer resource capabilities.
- Further develop mechanisms (such as the Sport and Active Recreation Knowledge Library) to share insights on participant needs and case studies on good practice in growing participation (e.g. through programme design, activation, promotion, collaboration).

## Partnerships & Collaboration

- Encourage funders to align investment to the sector's vision and goals, and to incentivise collaboration on strategic priorities.
- Compile and share a 'who's who' in the active recreation sector to encourage collaboration and information sharing towards common/agreed objectives.
- Foster regional/local networks to bring people together to share good practice, information and experiences.

## Investment

- Promote a common understanding of the sector's strategic priorities amongst funders and other enablers of the sector (such as central/local government, educators, investors and advocates) – looking to align funding to participant needs, sector priorities and multi-year investment, where possible. Prioritise and actively promote investment into quality multi-use places and spaces.
- Prioritise investment into programmes that provide sector-wide benefit and which build the capability of people across the sector.
- Prioritise development, support and investment into peak organisations, looking to build the capability (and influence) of people to lead and support their sectors. Look for evidence of sector-wide support as a basis for decision-making on investment.
- Monitor and evaluate investment based on outcomes achieved.
- Foster relationships between public and private sector and not-for-profits and commercial providers to connect and share expertise and to leverage commercial drivers.
- Actively seek private sector investment into places and spaces, people and programmes.
- Actively promote investment into spaces/places that encourage play and active recreation.

# Action Plan

These recommendations have been made to encourage action that supports the sector’s Vision and Strategic Priorities. Please take time to consider how your group/organisation can play a part and use this Framework to develop your Action Plan.

Education & Engagement	What we can do	Our potential partners
<ul style="list-style-type: none"><li>▪ Ensure that there is a clear understanding of the value of physical activity for recreation (i.e. the contribution to the health and well-being of individuals and to society).</li><li>▪ Promote the value of physical activity for all life stages, taking a whole-of-government/whole-of sector approach and aligning this to a broader communications plan regarding the value of the sport and active recreation sector.</li><li>▪ Adopt/support regional and local approaches to the building of participation opportunities (including through social media and technology).</li><li>▪ Develop and implement transition plans to address the drop-off points during key periods of change.</li><li>▪ Develop and implement workplace plans to promote physical activity in the workplace.</li></ul>		

Education & Engagement (continued)	What we can do	Our potential partners
<ul style="list-style-type: none"><li>▪ Use events as opportunities to promote and trial new activities for active recreation.</li><li>▪ Identify and consult with migrant community leaders to encourage community-led approaches that target low-participant groups. Encourage the sector to align active recreation provision to these low participant communities.</li><li>▪ Focus on active Play for young people, aligned to a Physical Literacy approach.</li><li>▪ Advocate for active recreation as a contributor to curricular and co-curricular activities within schools, aligned to a Physical Literacy approach.</li><li>▪ Focus on developing the participant skills, knowledge, attitudes and behaviour needed for quality active recreation experiences.</li></ul>		

Capability Building	What we can do	Our potential partners
<ul style="list-style-type: none"><li>▪ Develop active recreation ‘hubs’ as centres of excellence for people to share good practice, tools, templates, gain expert advice and create efficiencies. Investigate further opportunities for collaboration regarding cross-government data sets, to improve the understanding of the sector and the needs and expectations of participants.</li><li>▪ Improve the governance capabilities of people in active recreation organisations.</li><li>▪ Actively pursue opportunities for people to collaborate, share resources and facilities.</li><li>▪ Build shared volunteer resource capabilities.</li><li>▪ Further develop mechanisms (such as the Sport and Active Recreation Knowledge Library) to share insights on participant needs and case studies on good practice in growing participation (e.g. through programme design, activation, promotion, collaboration).</li></ul>		



Partnerships & Collaboration	What we can do	Our potential partners
<ul style="list-style-type: none"><li>▪ Encourage funders to align investment to the sector’s vision and goals, and to incentivise <u>collaboration</u> on strategic priorities.</li><li>▪ Compile and share a ‘who’s who’ in the active recreation sector to encourage collaboration and information sharing towards common/ agreed objectives.</li><li>▪ Foster regional/local networks to bring people together to share good practice, information and experiences.</li></ul>		

Investment	What we can do	Our potential partners
<ul style="list-style-type: none"><li>▪ Promote a common understanding of the sector’s strategic priorities amongst funders and other enablers of the sector (such as central/local government, educators, investors and advocates) – looking to align funding to participant needs, sector priorities and multi-year investment, where possible. Prioritise and actively promote investment into quality multi-use places and spaces.</li><li>▪ Prioritise investment into programmes that provide sector-wide benefit and which build the capability of people across the sector</li><li>▪ Prioritise development, support and investment into peak organisations, looking to build the capability (and influence) of people to lead and support their sectors. Look for evidence of sector-wide support as a basis for decision-making on investment.</li><li>▪ Monitor and evaluate investment based on outcomes achieved.</li></ul>		

Investment	What we can do	Our potential partners
<ul style="list-style-type: none"><li>▪ Foster relationships between public and private sector and not-for-profits and commercial providers to connect and share expertise and to leverage commercial drivers.</li><li>▪ Actively seek private sector investment into places and spaces, people and programmes.</li><li>▪ Actively promote investment into spaces/places that encourage play and active recreation.</li></ul>		

